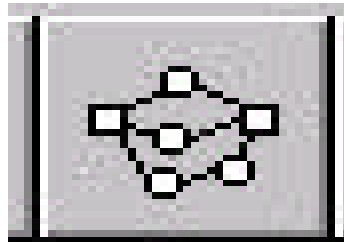


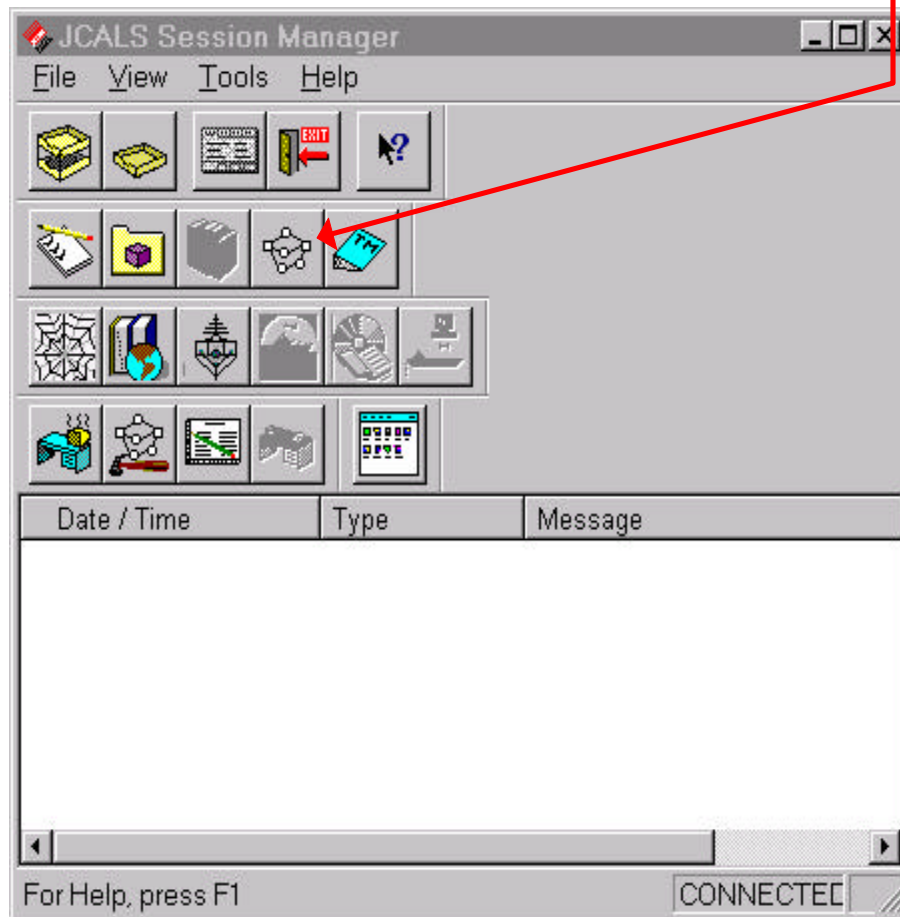
5.0 Workflow Icon

Step 1:

From the JCALS Session Manager
Single-Click on the



JCALS Workflow Manager Icon.

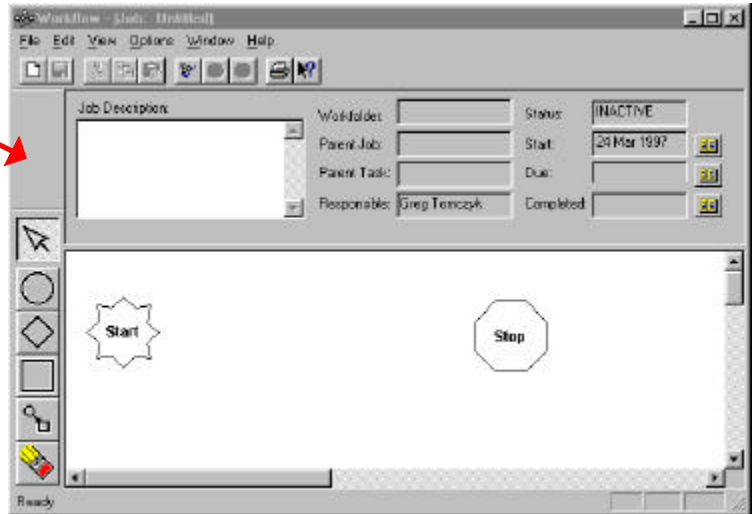


Continue on next Page ⇒

5.0 Workflow - Create a Template

Step 1:

This will be the first screen which appears after opening the JCALS Workflow Manager Icon.

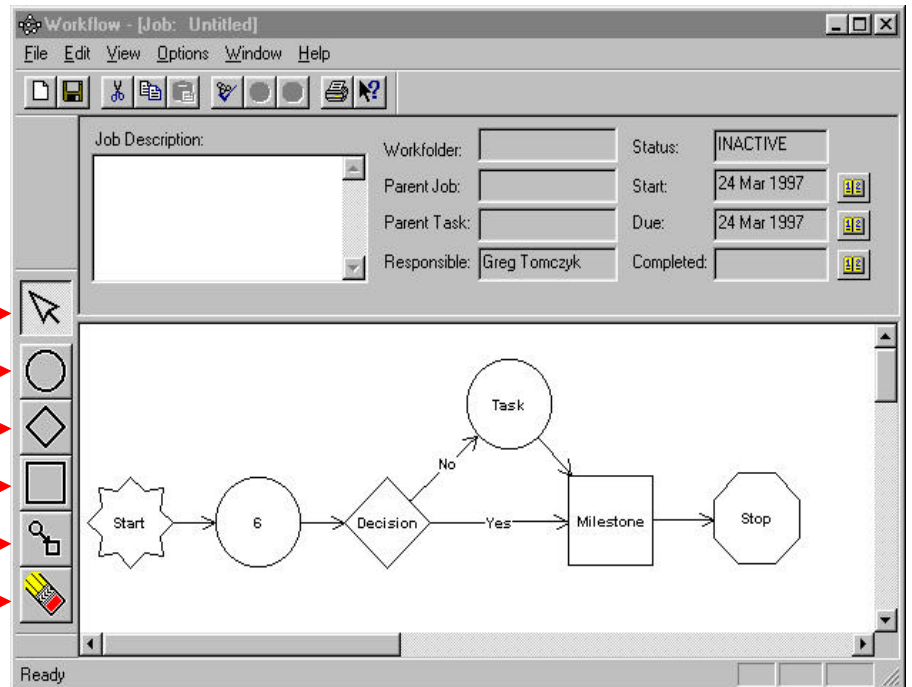


Step 2:

Single-Click on the desired Template Tools, to begin creating a new Job Template. Drag the items into the window to create a new Template.

Note:

Single-Click and Drag to window ...
NORMAL CURSOR ...
TASK ...
DECISION ...
MILESTONE ...
CONNECT TOOL ...
ERASE TOOL ...

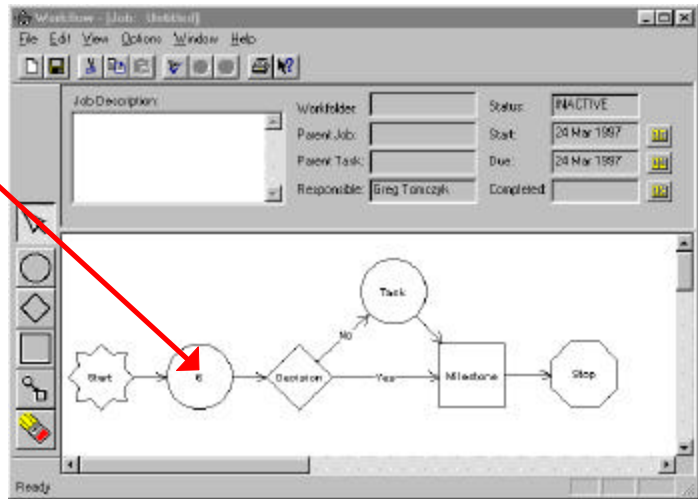


Continue on next Page ⇒

5.0 Workflow - Create a Template

Step 3:

Double-Click on a task,
this will open the Define Task window
shown in the next step . . .



Step 4:

This is the "Define Task" screen.

The screenshot shows the 'Define Task' window. It has a 'Task Type' dropdown set to 'Release Task When ALL Assignees Complete'. To the right, there's a 'Status' dropdown set to 'INACTIVE', and fields for 'Start' (24 Mar 1997), 'Due' (24 Mar 1997), and 'Released'. Below these, there's a 'Title' field set to '6', a 'Duration' field set to '0' with a 'DAYS' dropdown, a 'Priority' dropdown set to 'ROUTINE', and an 'Assign To' field set to 'Manager Standard Missile'. There's a small icon of a person next to the 'Assign To' field. At the bottom, there's a 'Description' text area. The window has 'OK', 'Cancel', and 'Help' buttons at the bottom right.

Continue on next Page ⇒

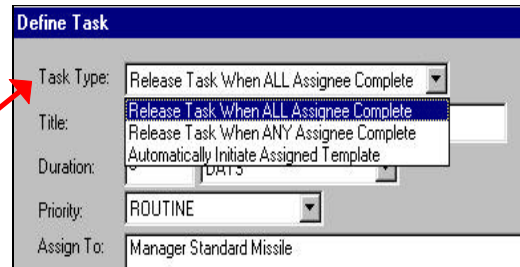
for instructions on using the
Define Task window:
Personnel assignment,
Setting Task duration,
Inputting Due Dates,
etc . . .

5.0 Workflow -Create a Template

Step 5:

Single-Click on a Task Type scroll bar, this will open drop-down choices.

Release Task When ALL Assignee Complete,
Release Task When ANY Assignee Complete, or
Automatically Initiate Assigned Template.
Choose the appropriate Task Type . . .

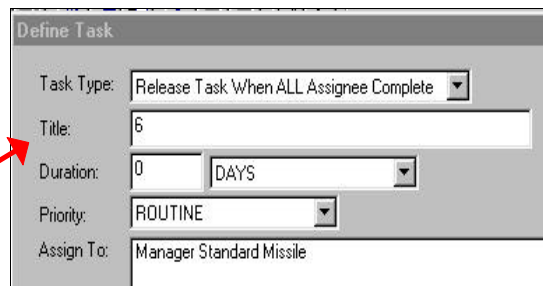


Step 6:

In the Title window, type in a one or two word description of the action to occur in this step.

(Review, Comment, Edit, etc.)
This title will appear in the task on the template.

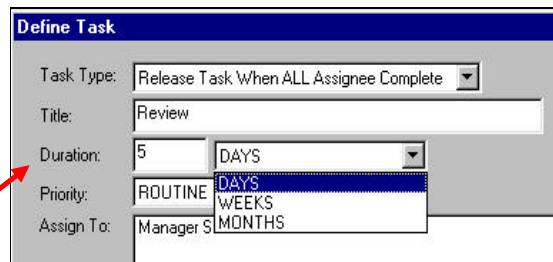
Make it brief !



Step 7:

Single-Click on the Duration drop-down menu arrow, this will open drop-down choices.

Days, Weeks, or Months . . .
and then enter the appropriate number.

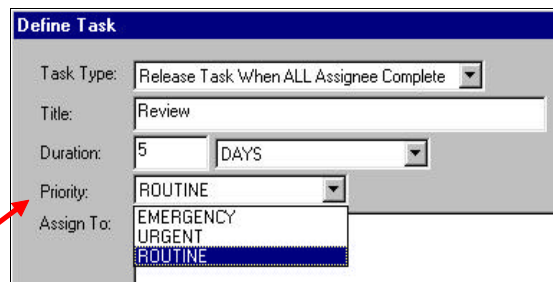


Step 8:

Single-Click on the Priority drop-down menu arrow, this will open drop-down choices.

Emergency, Urgent, or Routine . . .

normally "Routine" is selected.



Continue on next Page ⇒

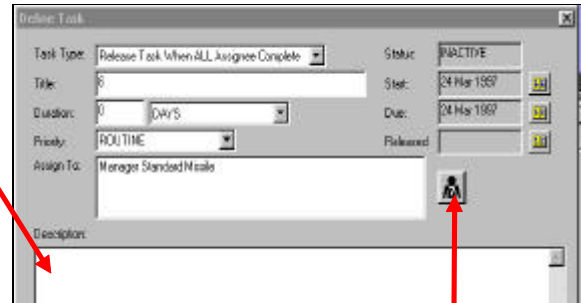
for instruction on assigning a task to particular personnel.

5.0 Workflow - Create a Template

Step 9:

Before assigning this task to an individual, describe specifically, in the Description window, what this person needs to do with the documents in the associated Workfolder . . . then, assign this task to particular person . . . to open the personnel choosing window,

Single-Click on the following icon
Allow approx. 20 to 30 seconds
for this next window to appear . . .

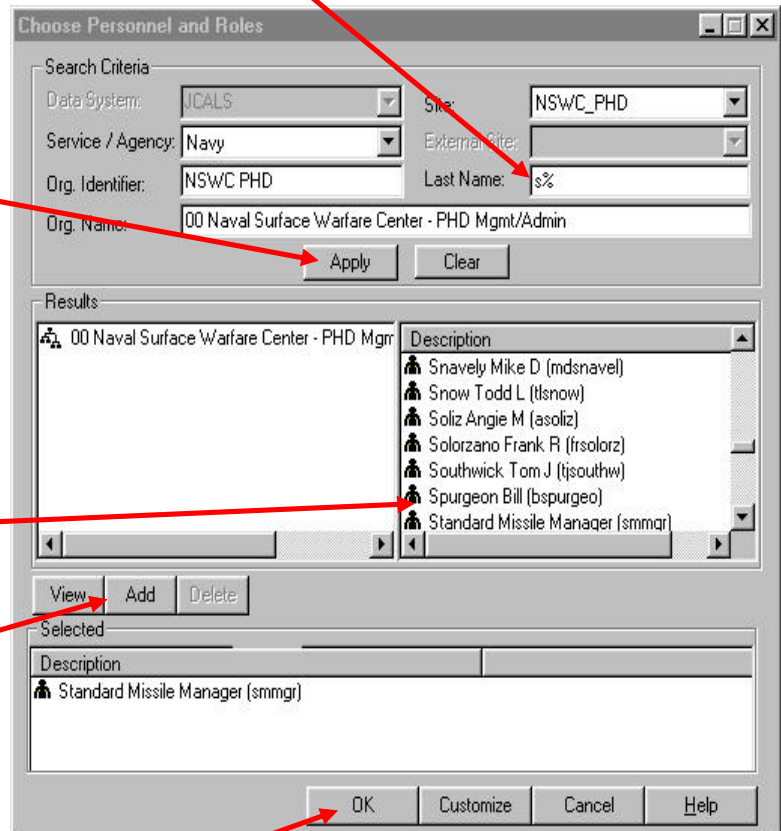


Step 10:

Place the cursor in the Last Name window . . . type in the person's name, (must be spelled correctly) then Single-Click on the Apply Button.

Note:

If you do not know the exact spelling of the person's name . . . You should type in the first few letter of the person's last name, followed by the percent sign (%), then, Single-Click on the Apply Button.



Step 11:

When the person's name appears in the Description window, hi-light the name . . . then Single-Click on the Add Button.

Step 12:

Single-Click the OK Button,

When the Define Task screen appears . . . Single-Click the OK Button which will bring you back to the Workflow screen.

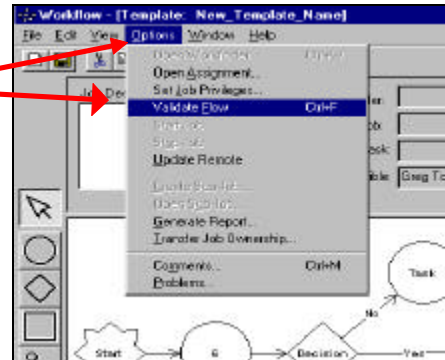
Continue on next Page ➡

5.0 Workflow - Create a Template

Step 13:

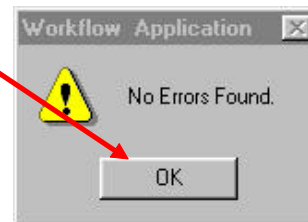
Always check
"Template Validation Flow".

Single-Click on Options in the menu bar
and choose Validate Flow,



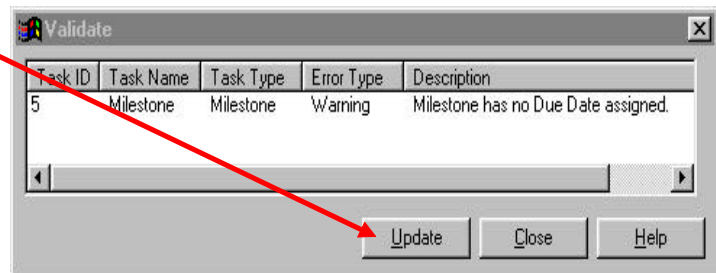
Step 14:

If the Workflow template
is done correctly,
then this window will appear
and state that "No Errors Found".
Click OK to continue.



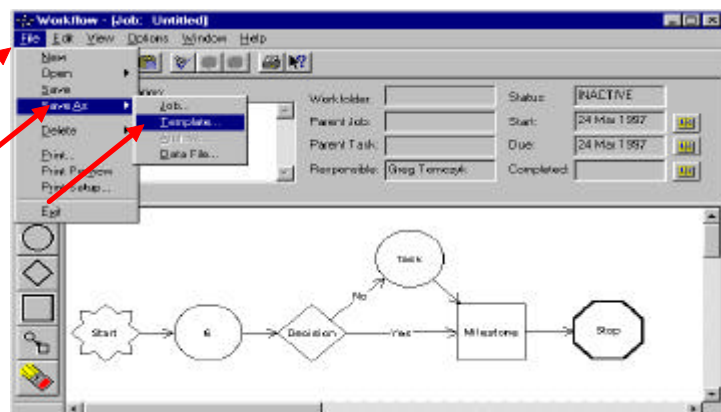
Step 15:

If the Workflow template
has flow errors,
then this window will appear
itemizing each error and
suggesting the fix in the
Description window.
Click Uppdate to continue.



Step 16:

To save the new template . . .
in the menu bar,
Single-Click
File
Save As,
Template.

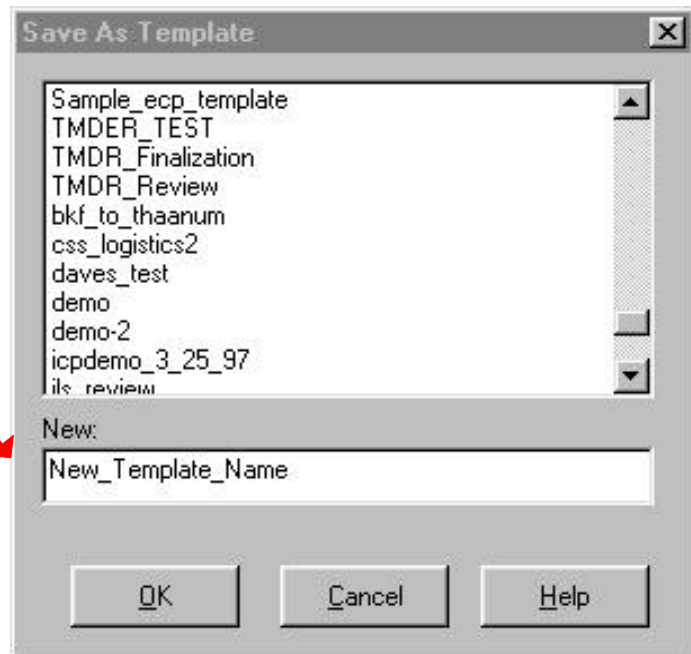


Continue on next Page ⇒

5.0 Workflow - Create a Template

Step 17:

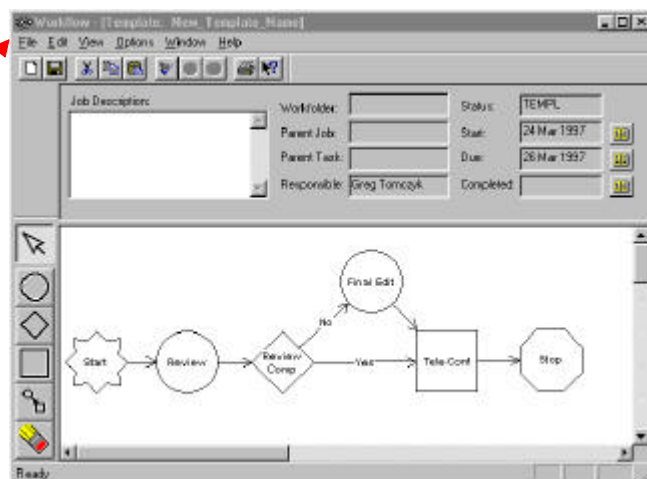
When the "Save As Template" window appears, type the name of the new template in the New window. Single-Click OK when finished.



Step 18:

After the template is saved, you will be in the Workflow window.

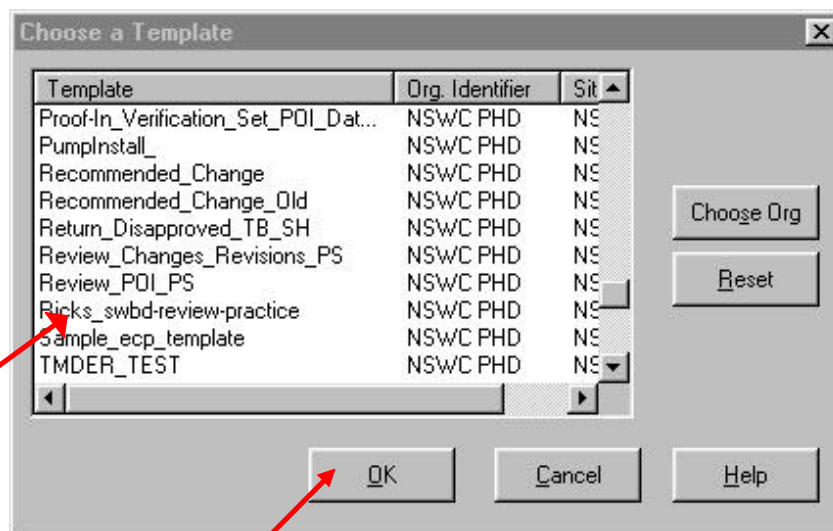
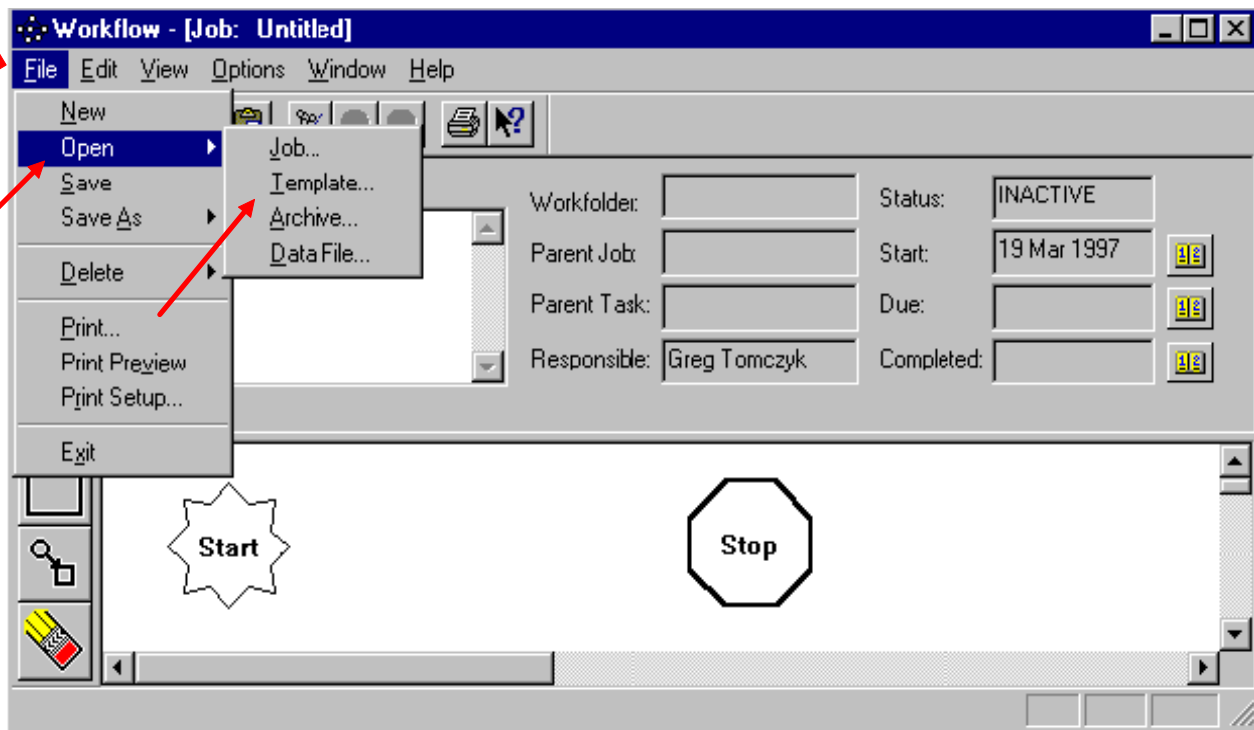
In the menu bar . . .
Single-Click
File,
Exit,
to get back to the
JCALS Session Manager.



5.0 Workflow - Get an Existing a Template

Step 1:

Single-Click on File in the menu bar and Choose Open, then Template.



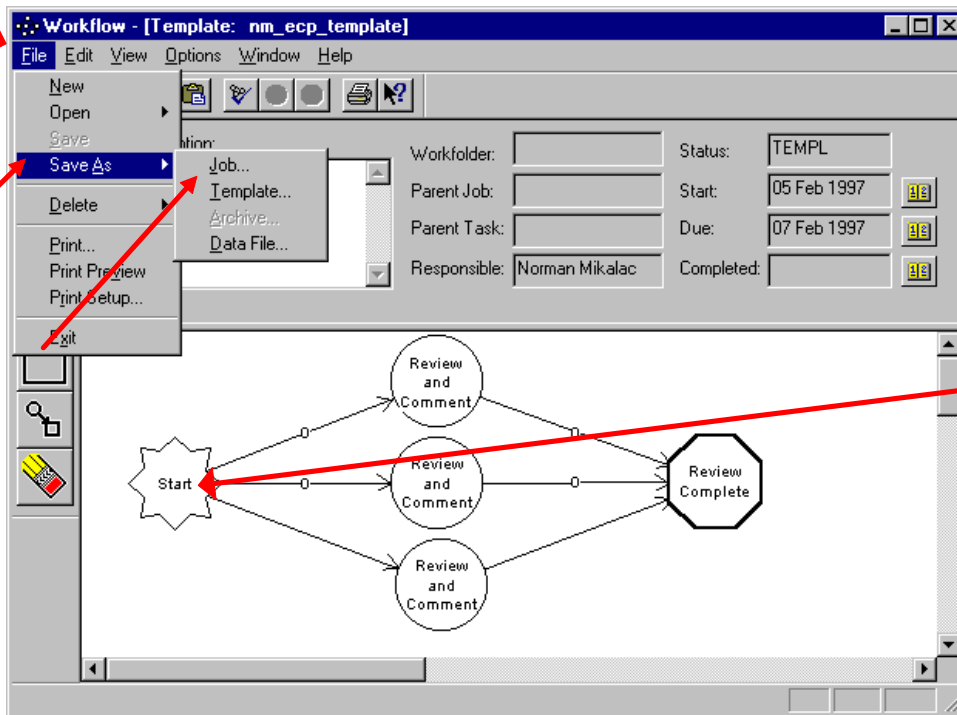
Step 2:

Single-Click on desired Template, and choose OK.

5.0 Workflow - Save a Template as a Job

Step 1:

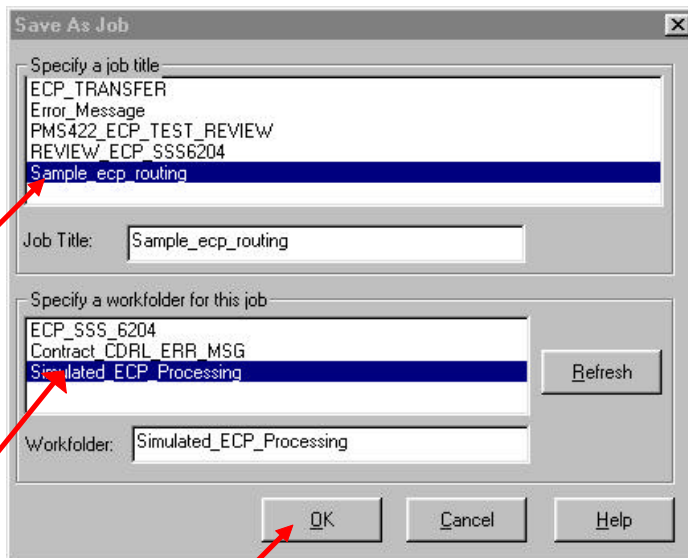
Single-Click on **File** in the menu bar and Choose **Save as**, then **Job**.



Note:

The "Start Date" associated with a newly saved Job does not default to the current date if you had used a previously created Template.

Remember . . . You must re-define the Job's "Start Date" by Double-Clicking on the Start Milestone and entering the Date you want the Job to begin.



Step 2:

Create (or choose, in some cases) a Job Title . . . and then, **Choose** a Workfolder, or create a new one by entering a new name. Click **OK** when finished.

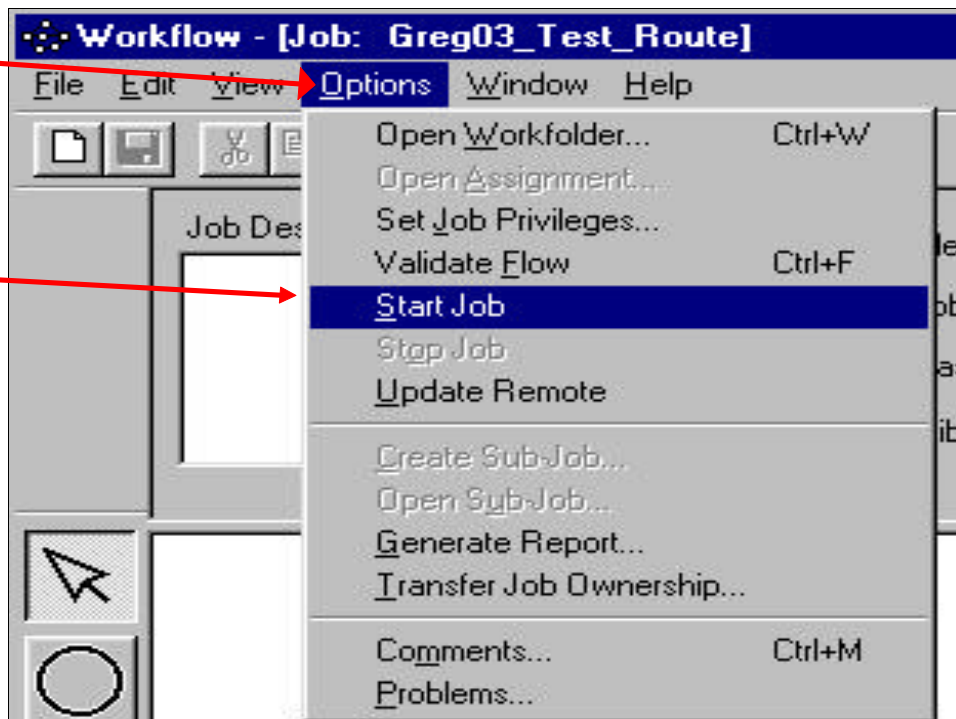
5.0 Workflow - Start a Job

Step 1:

To Start a Job . . .

you will need to have the new job opened in the Workflow window.
(Refer to previous Page)

Single-Click on Options in the menu bar and Choose Start Job.



Step 2:

After the job has been successfully started,
you will receive two pop-up windows to verify this.
Just Single-Click "OK" to continue.

Finally,

Single-Click on File in the menu bar and choose Exit.

You will then be back at the "JCALS Session Manager screen.